

# REGIONAL ADVISOR ACADEMY AGENDA

## OCTOBER 14, 2023

### DES MOINES, IOWA

WELCOME/CHECK IN	9:30 AM – 10:00AM
ADVISOR ACADEMY KICKOFF	10:00 AM – 10:20 AM
BETA GAME	10:20 AM – 10:30 AM
CURRENT TRENDS	10:30 AM – 11:00 AM
THE ROLE OF THE ADVISOR	11:00 AM – 11:20 AM
TRAVEL BREAK	11:20 AM – 11:25 AM
BREAKOUT LESSON ONE	11:25 AM – 12:05 PM
OPTION ONE: STRENGTHENING ADVISING TEAM CULTURE	
OPTION TWO: NUTS AND BOLTS OF TEAM OPERATIONS	
TRAVEL BREAK	12:05 PM – 12:15 PM
BREAKOUT DISCUSSION ONE*	12:15 AM – 12:50 PM
WORKING LUNCH	12:50 PM – 2:00 PM
TRAVEL BREAK	2:00 PM – 2:10 PM
BREAKOUT DISCUSSION TWO	2:10 PM – 2:45 PM
OPTION ONE: INCLUSION THROUGH FINANCE AND ACCESS	
OPTION TWO: IDENTITY IN RECRUITMENT AND RETENTION	
TRAVEL BREAK	2:45 PM – 2:50 PM
BREAKOUT LESSON TWO**	2:50 PM – 3:30 PM
TRAVEL BREAK	3:30 PM – 3:35 PM
LADDER OF RISK/EVENT PLANNING	3:35 PM – 4:00 PM
TRAVEL BREAK	4:00 PM – 4:05 PM
RITUAL SESSION	4:05 PM – 4:40 PM
OPTION ONE: BETAS – DEEP DIVE	
OPTION TWO: FRIENDS OF BETA – RITUAL LITE	
TRAVEL BREAK	4:40 PM – 4:45 PM
ADVISOR ACADEMY WRAP UP	4:45 PM – 5:00 PM